

## UCSF Implementation of New Steps in the Specialist Series

### Background:

The UC Office of the President (UCOP) has released an updated [Specialist Fiscal Year \(FY\) Salary Scale, effective 7/1/17](#), which expands the steps available at the full rank in the Specialist series from five to nine steps and which increases the on-scale annual salary rate threshold for the series from \$108,324 to \$148,380.

The 7/1/17 salary scale does not list normal years of service for the new steps. However, UCOP has confirmed that it will designate three years of normal service time at each step for Steps 5-8 and four years of minimum service time at Step 9. Both the salary scale and [APM 330](#) will be updated for release on 7/1/18.

In order to comply with the system-wide policy changes, it will be necessary for our campus to:

- Bring eligible individuals appointed at Specialist, Step 5 into the current advancement review cycle, effective 7/1/18.
- Convert individuals appointed at Specialist Above-Scale (A/S) to one of the new steps, effective retroactive to 7/1/17.

### Implementation Guidelines:

#### *Merit Advancement Review for Specialists, Step 5*

The principles for bringing Specialists, Step 5 into the current advancement review cycle will be as follows:

- All individuals who will have accrued three or more years of service time at Specialist, Step 5, as of 7/1/18, are deemed eligible for normal merit advancement review, effective 7/1/18.
- Active review packets proposing individuals for merit advancement from Specialist, Step 5 to Specialist A/S should be converted to merit advancement to Specialist, Step 6.
- Individuals without an active review packet should be notified of their eligibility for normal merit advancement review in the current academic review cycle following the standard procedures for HR Shared Services.

Please Note: Merit advancements from Specialist, Step 5 will not be decelerated in the current advancement review cycle. Beginning effective 7/1/19, individuals being reviewed for advancement who have accrued four or more years of service time at Specialist, Step 5 will need to be calculated for deceleration.

### *Conversion of Specialists Above-Scale (A/S) to Step*

The current annual salary rate will be used as the standard for conversion from Specialist A/S to Specialist, Step 6 or Step 7. The principles of conversion by this standard will be as follows:

- A/S Specialists currently being paid at or below an annual salary rate of \$116,304 are to be placed at Specialist, Step 6, effective retroactive to 7/1/17.
- A/S Specialists currently being paid above an annual salary rate of \$116,304 are to be placed at Specialist, Step 7, effective retroactive to 7/1/17.
- A/S Specialists currently being paid below the salary rate for the relevant step are to be brought up to the step rate, effective retroactive to 7/1/17. If not initially feasible, the Department would need to develop a plan to bring the candidate up to the correct rate by 7/1/19.
- A/S Specialists currently paid above the annual salary rate for Specialist, Step 7, will be kept at their current salary rate (at off-scale) until such time as they have been merited to the Specialist, Step 8.

Please Note: For those who have been converted back to step, any future merit advancement from Specialist, Step 9 to Specialist A/S would be processed as a normal merit advancement.

The process for conversion will be as follows:

1. Academic Affairs will provide letter templates to facilitate the conversion from A/S to step.
2. HR Shared Services will coordinate with the appropriate academic home departments/ORUs to complete the conversion letters for each Specialist A/S.
3. HR Shared Services will forward each completed conversion letter to the appropriate Academic Affairs Specialist.
4. The Academic Affairs Specialists will create appointment packets in Advance and upload the completed conversion letters for each Specialist A/S.
5. The Vice/Associate Deans for Academic Affairs will certify the packets.
6. The Academic Affairs Specialists will send the notifications and complete the packets to create records of the conversion in Advance.

### Resources:

- Conversion Letter Template for A/S to Step
- Conversion Letter Template for A/S to Step (off-scale)
- Conversion List for Specialists at A/S
- Eligibility List for Specialists at Step 5
- 7/1/17 Specialist FY Salary Scale